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Hamilton 1991:  
Future strategic  
directions

From report of Executive  
Committee in City Council  
Agenda, Dec 9, 1986,  
CA4 ONHBL A05 A31

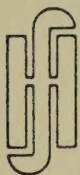
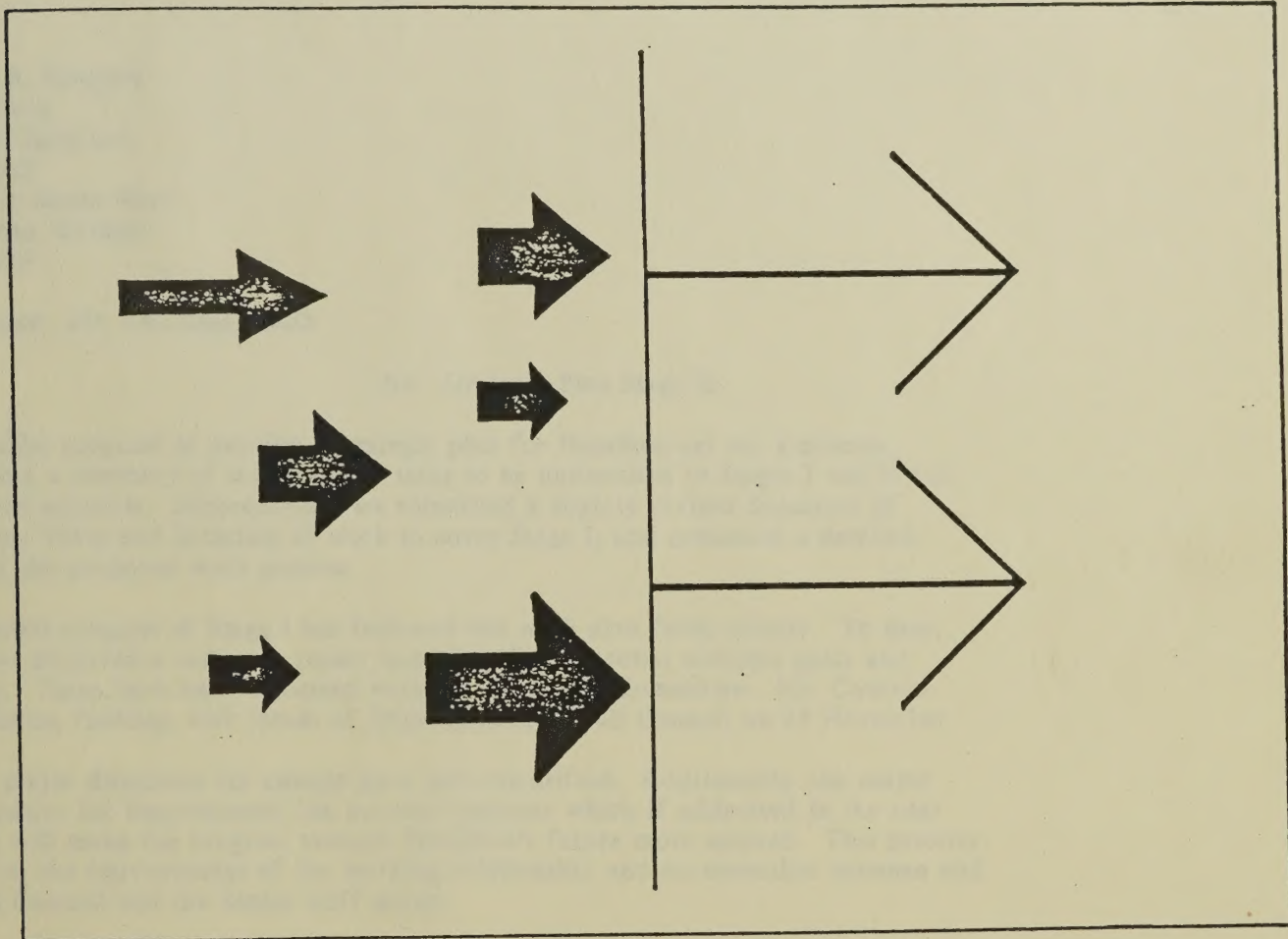




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Schedule "A" as referred to in  
Section 1 of the Twenty Sixth  
Report of the Executive Comm.

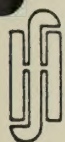
## HAMILTON 1991 : FUTURE STRATEGIC DIRECTIONS



**JAMES F. HICKLING**  
MANAGEMENT CONSULTANTS  
LIMITED







October 31, 1986

1776

Mr. E.A. Simpson  
City Clerk  
City of Hamilton  
City Hall  
71 Main Street West  
Hamilton, Ontario  
L8N 3T4

Attention: Mr. Lou Sage, CAO

**Re: Strategic Plan Stage II**

Our initial proposal to provide a strategic plan for Hamilton set out a process including a summary of the principal tasks to be undertaken in Stages I and II and a project schedule. Subsequently, we submitted a slightly revised Summary of Principal Tasks and Schedule of work to cover Stage I, and presented a detailed plan of the proposed work process.

The actual progress of Stage I has followed the work plan fairly closely. To date, we have prepared a summary report and identified potential strategic goals and thrusts. These have been discussed with the Executive Committee. Mr. Cousens will discuss findings with Heads of Department and Full Council on 24 November.

Three major directions for change have been identified. Additionally one major opportunity for improvement has become apparent which if addressed in the near future will make the progress towards Hamilton's future more assured. This priority refers to the improvement of the working relationship and co-operation between and within Council and the Senior staff group.

It is understood that we should:

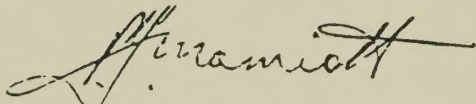
- a) proceed to Stage II of the preparation of a Strategic Plan for Hamilton,
- b) address the priority of improving the working relationship and co-operation between and within Council and the senior staff group, and
- c) begin Stage II at the beginning of December 1986.



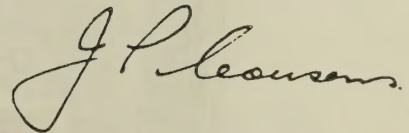
Similar to our detailed plan for Stage I, a plan for Stage II is set out on the attached.

Jim Cousens and I look forward to working with you to complete Stage I and on Stage II of this interesting and timely undertaking.

Yours truly,



Peter Marriott  
Principal









## HAMILTON 1991: FUTURE STRATEGIC DIRECTIONS

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### INTRODUCTION

Set out below is a summary of the purposes of strategic planning, the process to be followed and the tasks to be undertaken.

### WHAT STRATEGIC PLANNING IS

Strategic planning is a systematic and continuing process. The process will commence with an analysis of Hamilton's environment or context and the identification of key images, values and aspirations. Hamilton's strengths and weaknesses will be identified. The next general step will be to come to key conclusions about Hamilton's situation and direction. These conclusions become the foundation on which to base the mission statement and the supportive strategic goals and selected strategic thrusts that form the core of the strategic plan.

### WHAT STRATEGIC PLANNING IS NOT

Strategic planning is:

- o Not multi-year budgeting, although it has implications for it
- o Not synonymous with projections and forecasts but may use them
- o Not an extrapolation of past or current trends but is influenced by them
- o Not highly detailed but identifying specific key directions.





## STRATEGIC PLANNING AND STRATEGIC PLAN CONNECTION

Strategic planning is a continuing process. The strategic plan is the periodic result of that process. The process of strategic planning is dynamic. Periodic review and modification of the strategic plan being prepared now will be important in the future. When basic conditions that led to the formulation of this plan change, and as the plan's goals become achieved, then the strategic planning process should systematically lead to a new revamped strategic plan. In this continuing process, Council will customize the strategic plan to meet Council's needs and operating style.

## WHY HAMILTON STRATEGIC PLANNING?

Strategic planning offers Hamilton an additional way to identify and cope with change. For Hamilton, change is occurring faster and on a broader basis than ever before. There is no evidence that this pattern will abate within the foreseeable future. If anything, change affecting Hamilton could intensify as the Canadian and world economies change. Strategic planning will help Hamilton to:

- o Respond to the changing environment
- o Force reassessment of what is done and how it is done
- o Use limited resources more efficiently
- o Provide unifying directions for the City to reflect and to pursue
- o Stimulate longer-range thinking and actions than would otherwise occur.

In sum, strategic planning will assist Hamilton to shape its destiny.





## STRATEGIC PLANNING PROCESS

Stage 1 of the strategic planning process was designed to focus on the aspirations and goals of Council, to provide Council with an overall corporate mission and to assist Council to achieve three objectives:

- a) to identify major goals that would be achievable within the period to 1991,
- b) to identify a longer term perspective of which the 1991 achievements would form part, and
- c) to build sound working relationships between Council and City Department Heads.

The focus was on City Council and Council's wishes.

## SUMMARY OF PLANNING TASKS AND WORK PROCESS FOR STAGE II

Time is of the essence. Full participation by Aldermen and Department Heads is vital.

We propose to undertake the tasks set out in Exhibit 1. Note that Stage II is designed to be completed over two months: December 1986, and January 1987. The schedule of tasks is shown in Exhibit 2.

The tasks are spelled out in more detail in Exhibit 3.



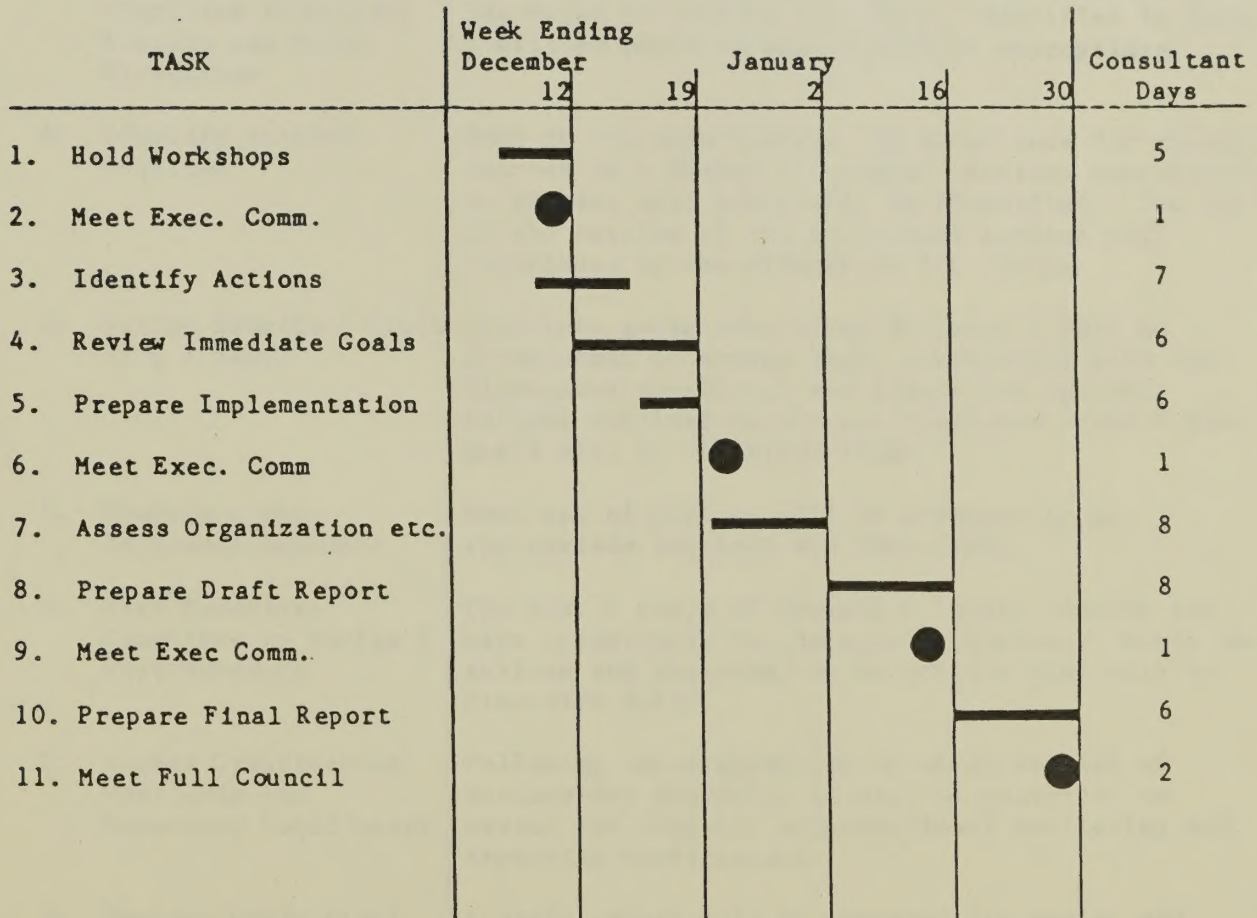
EXHIBIT 1: SUMMARY OF PRINCIPAL TASKS (Revised from proposal)

| Stage II: Implementation Plan |                                                                              | Timing (wks) |
|-------------------------------|------------------------------------------------------------------------------|--------------|
|                               | Hold Workshops with Council and Senior Staff<br>1                            | 1            |
|                               | Meet Executive Committee Review Results and Major Directions for change<br>2 | 2            |
|                               | Identify Actions Required to Address Directions for change<br>3              | 2-3          |
|                               | Review Immediate Goals (2 and 5 year)<br>4                                   | 3-4          |
|                               | Prepare 2 year Implementation Schedule and Responsibilities<br>5             | 4            |
|                               | Meet Executive Committee to review 2 year schedule etc.<br>6                 | 5            |
|                               | Assess Organizational, Monitoring and Reporting Requirements<br>7            | 5-6          |
|                               | Prepare Draft Final Report<br>8                                              | 7-8          |
|                               | Meet Executive Committee Present Draft Final Report<br>9                     | 8            |
|                               | Prepare Final Report<br>10                                                   | 9-10         |
|                               | Meet Full Council to present Final Report<br>11                              | 10           |





EXHIBIT 2: SCHEDULE OF PRINCIPAL TASKS



● meetings with Executive Committee and Council



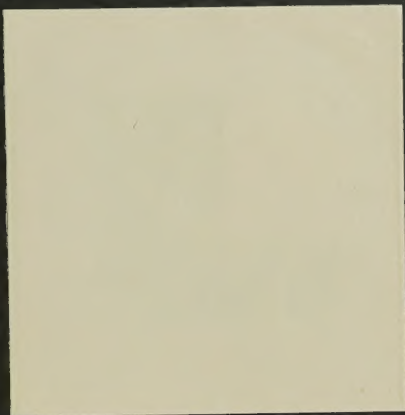


EXHIBIT 3: WORK PROCESS DETAIL: STAGE II (Expanded from Proposal)

| PRINCIPAL TASKS                                                    | METHOD/PURPOSE                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Hold Workshops with Council and Senior Staff                    | Two workshops will be held for Council and for Senior Staff with the objective of developing co-operative working arrangements around common objectives.                                                                                        |
| 2. Meet Executive Committee to Review Results and Major Directions | The results of the workshops will be discussed. The Major Directions for change identified in Stage I will be reviewed and revised as appropriate.                                                                                              |
| 3. Identify Actions Required                                       | Each of the main thrusts, or directions for change, touches on a number of issues. Actions appropriate to address each issue will be identified. The sum of the results of the individual actions will contribute to the directions for change. |
| 4. Review Immediate Goals (2 & 5 year)                             | Immediate goals identified in Stage I will be re-assessed to ensure their consistency with the Directions for Change and identified actions. Actions required to address immediate 2 and 5 year goals will be described fully.                  |
| 5. Prepare 2 year Implement Schedule                               | Each set of actions will be arranged in an appropriate sequence and time-table.                                                                                                                                                                 |
| 6. Meet Executive Committee to Review 2 year Schedule              | The next 2 years of Council's tenure present the best opportunity for measurable success. Goals and actions and the schedule to achieve them will be discussed fully.                                                                           |
| 7. Access Organization, Monitorig and Reporting Requirments        | Following the preparation of an agreed set of actions and schedule, it will be necessary to assess and identify organizational monitoring and reporting requirements.                                                                           |
| 8. Prepare Draft Final Report                                      | A draft report will be prepared for review and comment by the Executive Committee                                                                                                                                                               |
| 9. Meet Exec Committee to Present Draft                            | The Draft Report will be presented to Executive Committee and comments/revisions invited                                                                                                                                                        |
| 10. Prepare Final Report                                           | The Final Report will incorporate revisions suggested by the Executive Committee and include an executive summary.                                                                                                                              |
| 11. Meet full Council to Present Report                            | The final Report will be prsented to Full Council                                                                                                                                                                                               |

| ITEM NO. | DESCRIPTION                                                                                                                                                                |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.       | General and overall<br>The working group will be held in Geneva and the<br>General Secretariat will be responsible for providing<br>the necessary facilities and services. |
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